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ABSTRACT

An interlibrary loan telephone loop system operated by the Kansas City Regional Council for Higher Education libraries is briefly described. Chronological steps in establishing the loop are delineated, and early problems are identified. Expansion of the loop and special uses also are discussed. Conclusions about the operation and tips for others are given. Appendixes include the detailed original proposal, statistics on loop use, request forms and monthly report forms. (SK)

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A TELEPHONE LOOP THAT WORKS

John P. Young

When Julia Schneider contacted me, she asked that I speak about our interlibrary loan telephone loop system: how it began, what we hoped to accomplish, and what is taking place now. With that in mind, I thought I might share with you a chronological picture of what has taken place with regard to the telephone loop from its origin right up to the present.

During the summer of 1973, several of the Kansas City Regional Council for Higher Education (KCRCHE) librarians wondered if there was not some way that they could: 1) improve the sharing of library resources among a selected group of participants; 2) improve the method of searching for needed interlibrary loan materials--systematize the procedure rather than depend on a hit-or-miss basis of calling from one library to another; 3) speed up the time between the requesting of an interlibrary loan from a patron and the actual receipt of that material; and 4) keep the paperwork, in the process, to a minimum.

With this in mind, a plan was developed.

First, we were fortunate in that all KCRCHE member libraries either had a Kansas City telephone number, or had a foreign exchange line--this is the same as having a Kansas City phone number. This made our task of calling, even from outlying areas, an easy one. No toll calls were necessary.

Second, we needed a group of libraries to participate in the project.

Third, a set of policies to follow in lending materials was needed.

Last, a set of procedures was needed to keep the flow of materials and requests moving smoothly between participants.

By the fall of 1973, four libraries had agreed to try out a loop arrangement for a trial period of one semester. The arrangement was

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to be evaluated at the end of the semester to see if such a system was worth continuing. Two libraries in Kansas--Ottawa and Baker--and two in Missouri--Park and William Jewell--were the first participants.
Details on procedure, forms, and policies are in the appendix.

After completing one semester of telephone looping, an evaluation was made of total transactions--requests filled--to see if we were meeting the goals we had originally set for our system.
During second semester, we wanted to try a new and different approach.

First, we wanted to enlarge the number of participants to at least six members: we felt we needed to add to our resource base; and we wanted to expand the volume of loop requests--greater volume could show a better fill-rate.

Second, we wanted to change from a loop arrangement to a conference call system. Since we were all KCRCHE member institutions, we all shared in a direct line to the KCRCHE headquarters in Kansas City. Conference call capability was already available to consortia members through what was called KCRCHE CONTROL. Each campus could join in on a conference call by going through his/her local switchboard. This telephone hookup was possible through a three-wire communications system.

The benefits of a conference call were:

1) conferencing involved only two calls per day, per library--since all schools were on at the same time--thereby allowing each library to know that same day if it's request was filled (something not readily available on a looping model). If looping, either one must rotate the call schedule and participants, or extend the calls to make a nearly double loop in a single day--not an efficient use of time.

2) since there was no charge involved in conferencing--the libraries paid no toll charges or time charges--we thought, WHY NOT!

3) we wanted the KCRCHE administration and staff to see how much use libraries could make of the phone system

they had installed--thereby showing our ingenuity and increasing our visibility with the KCRCHE central office.

Third, we wanted to add what we called a referral system.

The referral system was easily adapted to the conference call approach. By marking off all titles filled each day on the second conference call, it was an easy matter to see which titles were unfilled. These unfilled titles were cumulated and a call was made to Kansas City (MO) Public Library each Tuesday and Thrusday to see if any of the unfilled titles were available from their collection. If a title was listed as available in the Kansas City (MO) Public Library's card catalog, the call number was recorded and this information, along with location, was put back on the conference call each Wednesday and Friday. No attempt was made to verify whether the book was actually on the shelf. Only location was important. The same kind of referrel was done each Thursday for books still not located. This call was to The University of Missouri-Kansas City Library. A call was made to their reference desk. This information was likewise reported back to the requesting library on Friday--again, only location and call number.

Referral items were handled in the usual fashion by requesting libraries, i.e. by mailing in an interlibrary loan multi-part form. If any other library in the Kansas City metropolitan area was thought to have a particular title--where titles were descriptive--a call was made to that library, e.g. Linda Hall Library (science and technology), St. Paul's School of Theology, University of Kansas Medical Center, Chemagro, etc. With the referral system, we were searching approximately 2,300,000 volumes for each title request.
The referral system greatly improved our fill-rate during the second semester--from 35% for first semester to 70% second semester--as did the addition of two libraries to the conference call.

After completing a full year of interlibrary loan by telephone looping and conference calls, the following was evident:

1) we were more or less exhausting the resources available in

the immediate vicinity before looking elsewhere for needed titles;
2) we were moving more titles between libraries in a rapid manner;
3) we were able to tell our patrons within twenty-four hours or less if they could expect a requested title in two or three days, or whether we would have to search outside the region, extending the waiting time; and
4) while using other library collections more extensively, we were also making greater use of our own collections by sharing titles with other libraries in the region--as our borrowing increased, so did out lending.

With the summer of 1974 came the loss of our telephone conferencing capability--conferencing was still possible through Southwestern Bell, but not as easily, and certainly not as inexpensively! The KCRCHE CONTROL central switchboard was phased out due to loss of consortium federal funding. The expense of continuing such a system was in excess of $100,000 per year.
In 1974-1975, we returned to a loop arrangement again. New participants replaced some of the former participants, and times for calling were again established.

Having gone full circle, I think the telephone system for filling interlibrary loan requests shows:

1) the loop (conference) system is filling an essential need as demonstrated by the number of requests being made on the system;
2) one of the primary goals in establishing the system--to increase the sharing of resources between libraries --has met with some success;
3) use of the telephone makes efficient use of available equipment at little if any cost to the participants;
4) there is evidence to support the case that small college libraries can and do have materials to share with like

size libraries--just because we are liberal arts college libraries doesn't mean we purchase the same titles for our collections; and

5) materials can be moved quickly and inexpensively between libraries if the librarians are willing to cooperate--interlibrary loans do not always have to take three months to obtain (think what a shock this would be to some of your patrons!).

APPENDIX

TELEPHONE LOOP RECOMMENDATION

This is a recommendation that four KCRCHE Libraries participate in an experimental telephone looping system on a daily basis for the purpose of simplifying and promoting the interlibrary loan of books.

I would suggest that this pilot project be attempted from September 3, to December 21, 1973. Suggested participants are Park College, Baker University, Ottawa University, and William Jewell College. Initially this could be tried as a closed system among the four libraries in order to determine the possibilities, limitations, and changes needed in such a project.

Upon completion of the three-month trial period, the effectiveness and efficiency of the looping system will be evaluated. A decision on modification, continuation, expansion, or suspension of the system will be made at that time.

The following describes the (1) method of flow between the participating libraries; (2) suggested procedures and responsibilities of the participants; and (3) recommended forms for the accumulation of necessary data.

Recommended flow of requests:

10:00 A.M. - William Jewell calls Park. Requests for books are immediately searched in Park's card catalog. Any item found is immediately mailed to the library needing it. Items not found, plus new requests received on Park's campus are then included in the 10:30 o'clock call.

10:30 A.M. - Park calls Baker. The process is repeated.

11:00 A.M. - Baker calls Ottawa. The process is repeated.

11:30 A.M. - Ottawa calls Jewell. Jewell repeats the process but does not continue its loop call until the next morning at 10:00 A.M.

The recommended flow of requests would rotate among participants as to time of call, according to the following pattern of first requester:

William Jewell	September 3 - September 28
Park College	October 1 - October 26
Baker University	October 29 - November 23
Ottawa University	November 26 - December 21

The request for an item that goes clear around the loop and returns to the requesting library is then taken off the loop by the originating library.

A request will be considered filled when the lending library mails the item to the requesting library.

Recommended loop call procedure:

1) fill out FORM 1 for each title requested--top part only--and be sure to include name of original requesting library
2) check card catalog
3) check shelf
4) if a book is not on the shelf, or is for some other reason not immediately available for loan, continue that request on the loop
5) remove requests from loop that can be filled by your library
6) remove requests that originated from you library that were unfilled
7) at time specified, call next library on loop
8) request those titles from the loop that were not filled by your library--be sure to identify original requesting library
9) request titles needed by your library--previously filled out on a FORM 1
10) fill out FORM 2
11) prepare materials and mail
12) when requested materials are received, fill in the bottom portion of FORM 1--lines 3, 4, and 5

Recommended procedures for implementing the loop agreement:

I Lending Library
- will provide return mailing labels with each loan.
- will absorb costs for postage and insurance one way.
- will liberalize material restrictions as much as possible.

II Requesting Library
- will screen all requests to assure that general loan conditions are met.
- will be responsible for all normal library material needs of their patrons in such matters as class reserve, duplicate, etc.
- will honor any limitations on material use or availability as determined by the individual lending library.
- will not acknowledge receipt of material under normal conditions.
- is responsible for returning loans promptly and in good condition.
- will assume all repair or replacement costs of loaned material, should such be necessary.
- will note postage on items received and indicate on daily loop form.

III General Loan Conditions

- transaction will be confined to Monday through Friday only.
- all requests are to be routed according to the recommended looping pattern.
- materials requested are to be properly verified, whenever possible, for correct entry.
- loan periods will be calculated from time of receipt by requesting library. Time in transit will be disregarded.
- a four-week loan period will be used for the purpose of uniformity.
- renewals are to be kept to a minimum. When requested, renewals will be granted for a like period of time.
- all loaned materials are subject to recall if needed by the lending library.

IV Request Data and Format

- in order that we keep adequate and uniform records of transactions, participating libraries should maintain a daily log of all incoming and outgoing requests. The included sample forms will assist in the compilation of information necessary to provide for a quantitative evaluation of the looping system.

Sample forms are as follows:

TELEPHONE LOOPING OF ILL REQUESTS

Requesting Library_____Date_____

Author_____

Title_____

Ed._____Place_____Publisher_____Date_____

- -

(for use of initiating library only)

Verified in_____

Requester's Name/Phone_____

Request filled_____Unfilled_____

Time required to fill request_____
days

Costs incurred for mailing (Library Rate)_____

KCRCHE LOOP TRANSACTIONS

FINAL REPORT

September 6 - December 21, 1972

LIBRARY	BOOKS REQUESTED	REQUESTS FILLED	% FILLED	BOOKS LOANED	TITLES SEARCHED
William Jewell	81	29	35.8%	28	150
Park	79	31	39.7%	25	172
Baker	23	7	30.4%	28	202
Ottawa	113	37	32.7%	23	137
TOTAL	295	104	35.2%	104	

AVERAGE REQUESTS PER DAY - 4.0

PRELIMINARY EXPLANATIONS

FORM 1 -- to be used during phone conference to record requests made by other library participants.

FORM 2 -- internal request forms. I will furnish you copies if you so desire. Otherwise, feel free to use your own forms.

FORM 3 -- reports of monthly loop transactions to be filled out on the last day of each month. Copies can be returned in a window envelope.

DEFINITIONS -

LOOP -- six libraries participating

REPORT-OUT -- libraries reporting availability of a title in their collection

REQUEST-IN -- requests placed on the loop by a library

PROCEDURE -

1) Fill out a FORM 2, or your own internal form, for each request-in to be made from your library. Number your requests each day (1,2,...). Each library will be assigned a distinct block of numbers. When all numbers have been used, start over again. The numbers are:

Park	0 - 99
William Jewell	100 - 199
Ottawa	200 - 299
Baker	300 - 399
Benedictine	400 - 499
Rockhurst	500 - 599

2) Conference call is made each day, Monday through Friday, at 9:00 a.m. You will need to call KCRCHE Control between 8:55 a.m. and 9:00 a.m. to join the conference.

3) William Jewell will report-out additional locations for unfilled titles if located, giving: a) requesting library; b) request number; c) where request is available; and d) call number. We will report first (SEE NOTE).

4) Loop request-in and report-out will be made in the following order, with the first named going first, etc.

Park
William Jewell
Ottawa
Baker
Benedictine
Rockhurst

5) We will conference again at 11:00 a.m. each day to report-out titles available. Report-out will follow the same pattern as in 4 above.

6) As request-ins are filled, each library will mark off those titles on their FORM 1--as we proceed through the cycle. In this manner, we will not fill the same request from more than one library.

7) All remaining requests will be picked up by William Jewelll to search further.

cWilliam Jewell takes all unfilled requests and checks, by phone, the University of Missouri at Kansas City General Libary, Kansas City Public Library, and other possible Kansas City based libraries. We determine location of a title only. This information is relayed back to the requesting library on Wednesday and Friday of each week.ɔ

The time between the end of the 9:00 a.m. conference call and the next call at 11:00 a.m. will be used to search your card catalog and check the shelf for title availability.

NOTE: William Jewell will cumulate unfilled requests and check their availability each Tuesday and Thursday. We will report-out titles found on Wednesday and Friday. Method of report-out is as follows:

0	3	KCPL	325/W23
(Ottawa)	(Request No.)	(Library)	(Call No.)

It will be the responsibility of each participant to record actual requests filled on the referral items and report these transactions on their monthly report.

FORM 1

K C R C H E T E L E P H O N E R E Q U E S T S

DATE_____ FILLED____ REFERRAL____ _____ Call No.
Library

No.

REQUESTING LIBRARY (circle one): P StM OTT BK BD MoW

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

K C R C H E T E L E P H O N E R E Q U E S T S

DATE_____ FILLED____ REFERRAL____ _____ Call No.
Library

No.

REQUESTING LIBRARY (circle one): P StM OTT BK BD MoW

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

K C R C H E T E L E P H O N E R E Q U E S T S

DATE_____ FILLED____ REFERRAL____ _____ Call.No.
Library

No.

REQUESTING LIBRARY (circle one): P StM OTT BK BD MoW

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

K C R C H E T E L E P H O N E R E Q U E S T S

DATE_____ FILLED____ REFERRAL____ _____ Call No.
Library

No.

REQUESTING LIBRARY (circle one): P StM OTT BK BD MoW

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

FORM 2

K C R C H E L O O P R E Q U E S T

DATE_____ FILLED____ REFERRAL____ _____ Call.No.
Library

No.

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

Requester's name/phone_____

Loaned from (circle one): P WJ OTT BK BD R KCPL UMKC _____
Other

Date received_____ Date due_____ Date returned_____

Time required to fill request_____
days

K C R C H E L O O P R E Q U E S T

DATE_____ FILLED____ REFERRAL____ _____ Call No.
Library

No.

AUTHOR_____

TITLE_____

EDITION_____ PUBLISHER_____ DATE_____

Requester's name/phone_____

Loaned from (circle one): P WJ OTT BK BD R KCPL UMKC _____
Other

Date received_____ Date due_____ Date returned_____

Time required to fill request_____
days

Form 3
Revised

Month
Reported

KCRCHE TELEPHONE NETWORK

Monthly Report

I. Number of titles requested by your library: _____

Request No.	Filled?	By	Request No.	Filled?	By

II. Requests you filled for KCRCHE libraries: _____

Request No.	For	Request No.	For

_____

Library & Date

ANALYSIS OF KCRCHE TELEPHONE NETWORK TITLE FULFILLMENT

MONTH	REQUESTS	REQUESTS FILLED BY CONFERENCE (%)	REQUESTS FILLED BY REFERRAL (%)	TOTAL REQUESTS FILLED	PERCENT OF REQUESTS FILLED
January 74	95	48 (72%)	19 (28%)	67	70 %
February	77	25 (52%)	23 (48%)	48	62 %
March	80	40 (65%)	21 (35%)	61	76 %
April	119	57 (74%)	20 (26%)	77	65 %
May	23	13 (60%)	9 (40%)	22	96 %
TOTAL	394	183 (66%)	92 (34%)	275	70 %

Referrals: UMKC - 29
KCPL - 45
Other - 16

KCRCHE TELEPHONE NETWORK

TITLE FULFILLMENT

1973 - 74

	MONTH	REQUESTS	REQUESTS FILLED	% FILLED
	September 73	63	24	38 %
	October	137	52	38 %
	November	90	24	27 %
	December	5	4	80 %
**	January 74	95	67	70 %
	February	77	48	62 %
	March	80	61	76 %
	April	119	77	65 %
	May	23	22	96 %
		689	379	54 %

** Participation expanded form 4 to 6 libraries and referral system added.